## UNIVERSITY PAYROLL GIFT REPORTING INSTRUCTIONS

EMORY EmoryCard

Gifts received by faculty/staff are taxable and <u>must</u> be reported in income if their value exceeds the following dollar thresholds:

- Gift certificates/cards of <u>any</u> amount.
- Gifts of tangible personal property greater than or equal to \$75.
- Gifts of tangible personal property greater than \$400 to a long-service or retired employee.

**Note:** If you enter an invalid record #, you will have to delete the row and reenter the correct record #.

Gift reporting by University employees is now reported online via PeopleSoft Employee Self Service rather than the gift reporting form previously used to manually key gift amounts during payroll processing. The old gift reporting forms will no longer be accepted. A University employee can report gift amounts for a Healthcare employee but a Healthcare employee cannot report a gift for a University employee via Gift Reporting in Self Service. They must seek a University employee to report the gift amounts for them.

A report will automatically be generated each night notifying Payment Services of all entries for that day which will include the purchaser's empl ID and name for each gift reported. Please note that reporting gift amounts does <u>not</u> give the employee additional monies via the paycheck. The process only adds the gift amount to the system for tax purposes.

Accessing the System

- Access the Pay Request system by logging on to the following address: <u>https://psofthr.cc.emory.edu</u> and use your network ID and password to access the system.
- Click the following links to access Gift Reporting>Self Service > Gift Reporting > Create Gift Report



To Enter a Gift Report Amount

- 1. Select Create Gift Report option from the menu. You will be directed to a data entry screen to enter all employees with gift amounts.
- 2. Enter the empl ID in the first field. If necessary, click on the magnifying glass icon on the right side of the empl ID's field box to initiate a search record for the right employee.

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- 3. Enter known attributes of the individual you are looking for such as the last name, first name, department #, etc.
- 4. Click on the Look Up button to initiate search. If the employee has more than one record, a list will be provided of all records associated with that employee. The search list will include Empl ID, Record #, Name, Payroll Status, Department, Company, and Pay Group for easier identification of the correct employee.
- 5. No nonemployees will be allowed to be entered including those paid under company NIH or those with person-of-interest employee records.
- 6. Job records with WOC, NOC, or VAM paygroups will not be available for selection either.

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7. Click on the Empl ID of the employee you are reporting gifts for, preferably an active record if available. Please note that if you select an employee with a record number other than zero you will have to type in the record number in the corresponding field.

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8. Enter all pertinent information in each applicable field such as the employee record #, value of gift and purchaser's empl ID. Utilize the magnifying glass icon towards the right side of the Purchaser's field box to initiate a search record for the purchaser's empl ID if necessary. The recipient's name, company, pay group, purchaser's name will automatically populate based on the entries made in corresponding fields after hitting the enter button or by clicking on the

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- 9. Click on the plus sign icon to insert a new row.
- 10. Repeat the steps above until all employee's gift amounts have been entered. If you make a mistake and need to delete a row of information, click on the negative sign on the other side of the plus sign icon.
- 11. Upon completion of all information, click on the Submit button to submit entries into the payroll system. If there is an invalid record #, the system will give you an error message. You will have to delete the row and reenter the correct information.



12. Click the OK button.

View Request Status

- 1. Submitters will be able to view their submitted gift reporting. Click the following links to access Gift Reporting: Self Service > Gift Reporting > View Request Status
- 2. Payment Statuses

- Not Submitted, Rejected gift amount was submitted but rejected by Payroll
- Waiting Approval gift amount was submitted and is waiting on approval by Payroll to pull into payroll process
- Closed gift amount submitted, approved, and pulled into payroll process during corresponding pay cycle

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- 3. Click on the tabs at the top to select the status that you would like to view. You can click on any of the field headings to have the view resorted by that field.
- 4. If you have any questions regarding the payment request system, please contact the Payroll Department at 404-727-6100.